Industry Sector Analysis
UK

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Home Health Care and Rehabilitation Equipment

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SUMMARY

Estimated to total over $1 billion, the U.K. market for home health care and rehabilitation equipment serves over 4 million people -- almost one third of the total U.K. population. Demand has grown steadily over the past decade, driven by such public health trends as the growing U.K. population of elderly and disabled people; U.K. government initiatives that have promoted independence of the elderly and disabled; public health care cost containment efforts; and an increasingly high profile and demanding consumer base.

The sector is well established, yet fragmented, comprising some 300 companies that employ an estimated 10,000. The U.S. has a major presence in the market: Most large U.S. medical equipment manufacturers have operations in the United Kingdom, and the United States is consistently the No. 1 import supplier, supplying over one-third of the import market.

In the United Kingdom, the majority of home health care and rehabilitation equipment is provided to the user either free of charge or for a minimal fee through the publicly funded health care and social services programs. The U.K. National Health Service (NHS) and the Personal Social Services (PSS) program are responsible for funding the provision and servicing of most equipment. This statutory provision of equipment is mainly carried out by local social services departments or NHS health authority/hospital trusts. However, consumers have been increasingly turning to private purchase when the statutory services are unable to provide the item required or the system of supply takes too long.

With demand for home health care and rehabilitation equipment expected to increase through 2005, the U.K. market for this equipment looks promising for U.S. manufacturers. The best prospects for this sector include:

- High-tech equipment, such as powered wheelchairs and digital hearing aids;
- Equipment made of state-of-the-art materials, especially in the prosthetics and orthotics sectors;

- Sectors in which U.K. provision lags demand, such as hearing aids; and
- Equipment most affected by U.K. government initiatives to promote independence in the elderly and disabled communities, such as daily living aids.

However, U.S. home care and rehabilitation equipment manufacturers seeking to supply the U.K. market will face challenges such as:

- Public sector provision and service that continues to lag behind need and growing demand;
- The U.K. clinical governance agenda's requirements for higher and more- cost-effective quality and service standards; and
- Market regulations that include EU Medical Devices Directives and British and EU standards.

Given the highly diverse and increasingly competitive nature of the market, U.S. companies looking to sell their products in the United Kingdom are advised to work with an established local distributor, manufacturer, or wholesaler. The U.S. Commercial Service in London’s matchmaking services -- the Gold Key Service and the Agent/Distributor Service -- are proven, cost-effective programs that link U.S. companies to potential U.K. partners. For more information on these services, contact the U.S. Commercial Service in London at the address listed at the end of this report.

This Industry Sector Analysis (ISA) has been prepared as part of the U.S. Commercial Service in London’s contribution to a series of market research reports examining the U.K. medical sector, undertaken as part of the Showcase Europe Medical Sector Strategy. This strategy was developed by U.S. Commercial Service offices across Europe and, for the medical sector, is coordinated by the U.S. Commercial Service in Düsseldorf. The series of ISAs is available on the U.S. Department of Commerce’s National Trade Data Bank, available on CD-ROM and on-line. For further information on Showcase Europe’s Medical Strategy, contact the U.S. Commercial Service in Düsseldorf. A full title listing of U.S. Commercial Service-London market research reports is listed on the U.S. Commercial Service London website at www.usembassy.org.uk/fcs and the Showcase Europe website at www.sce.doc.gov.

1. MARKET HIGHLIGHTS AND BEST PROSPECTS

1.A. Sector Definition and Size

For the purposes of this report, the home health care and rehabilitation equipment sector is defined by the five categories below:

- Prosthetics, or artificial limbs;
- Orthotics, including orthopaedic footwear, callipers, splints, and surgical collars;
- Mobility and seating equipment, such as walking sticks, wheelchairs, scooters, and adjustable chairs;
- Lifting and handling equipment, including hoists, slings, and patient transfer aids;
- Audiology equipment, such as hearing aids and specialized telephone and TV aids; and

Daily living equipment, which ranges from the simple and low-tech – such as bathtub safety rails – to high-tech assistive technology products that help people live independently in the community.

The U.K market for home health and rehabilitation equipment is estimated to total over $1 billion, based on public-sector and care home expenditure statistics (see Tables 1a and 1b).

Table 1a: Public Sector Expenditure on Select Home Health Care and Rehabilitation Equipment, 1998

	Expenditure ($m)
Prosthetics	96
Orthotics	128
Wheelchair/Seating	144
Daily living eqt.	176
Audiology	88
Total	**632**

Source: Audit Commission

Table 1b: Care Home Expenditure on Supplies

	1996 ($m)	**1998** ($m)
Total	**295**	**422**
-- Medical eqt.	68	93
-- Consumables	227	329

Source: Key Note, U.S. Commercial Service estimates

1.B. Demand Factors

Demand for home care and rehabilitation equipment in the United Kingdom is driven by four main factors:

Public health trends, including the aging of the U.K. population and the number of disabled people;
Public sector initiatives that promote independence of the elderly and disabled;
NHS cost containment efforts; and
An increasingly high profile consumer.

Public Health Trends

Population Age Trends

Perhaps the most significant driver of demand for home health care and rehabilitation in the United Kingdom is the graying of the population. Since 1931, the U.K. population has aged significantly, with the number of over 65s more than doubling. In 2000, one in five residents will be over 60, and the upward trend is projected to continue through 2005 (see Table 2). Between 1995 and 2025, the number of over 80s will increase by almost 50 per cent and over 90s will double.

Table 2: U.K. Population Trends, by age, 1999-2004

	1999 est. (m)	2004 (proj) (m)	% change 1999-2004
Total	**59.50**	**60.51**	**+3.6**
Ages 0-14	**11.37**	**11.08**	**-2.5**
Ages 15-29	**11.49**	**11.41**	**-7.0**
Ages 30-59	**24.49**	**25.50**	**+12.0**
Ages 60+	**12.15**	**12.52**	**+4.4**

Source: Mintel

At present, men's average life expectancy of 75 years will include nearly eight years of poor health. For women the picture is similar: They will spend nearly 11 years out of 80 in poor health. Older people are more likely to have a disability – nearly half of the disabled population is aged 65 or older, with sensory impairments becoming increasingly common with age.

The Disabled Population

As medical technology has extended the natural life span and led to increased survival from illness, severe birth defects, and accidents, the number of people with disabilities has grown. There are about 7.3 million disabled people in the United Kingdom, accounting for about 12 percent of the population. The level of disability increases with age: Only 9 percent of teenagers have a current long-term disability compared with 33 percent of those aged 50 to 65.

Additional Public Health Trends

U.K. demand for home health care and rehabilitation equipment has also been influenced by the number of people in long-term care accommodation and the rise in the number of new occupational and physiotherapy clients.

- There are almost half a million people in long-term care accommodation in the UK, and over 150,000 are in nursing homes; and
- Since 1994, the number of new occupational therapy and physiotherapy clients has risen by 19 percent to total 5,333 in 1999.

Public Sector Initiatives

The U.K. market for home care and rehabilitation equipment has also been driven by government initiatives to modernize its health care and social services programs. These initiatives spell out the commitment to promote independence and out-patient rehabilitation, and, as a result, many patients who would have previously been institutionalized have remained in the community. The initiatives include:

- The Community Care Act of 1993, which contains a wide range of initiatives to promote greater independence for older or disabled people;
- The 1997 New Deal for Disabled People (NDDP), a program to help disabled people and those with long-term illness into work and training;
- The November 1998 White Paper *Modernizing Social Services;*
- The national charter *Better Care, Higher Standards – A Charter for Long Term Care;*
- Health Act of 1999, which created new flexibilities for the NHS and social care to work together to provide better integrated services which focus on individual needs;
- National Service Frameworks focusing on mental health and elderly people, which raise the quality of care for these care groups;
- A Royal Commission report, which recommended reforms to make the care system more logical and more responsive to the changing needs of the individual;
- A March 2000 Audit Commission report *Fully Equipped*, which analyzed NHS provision of equipment to the elderly and disabled and listed recommendations for improving these services; and
- The July 2000 NHS National Plan, which provided for investment in a new tier of services – "intermediate care" – that will reach $1.4 billion (£900 million) a year by 2003/04 to promote independence, provide more choice for older people, and deliver higher quality care.

Public Sector Cost Containment

Demand for home health care and rehabilitation equipment has also been driven by the current strategy of the NHS toward cost containment A recent NHS inquiry into hospital bed occupancy revealed that at least two out of every 10 days spent by people over 65 in acute hospital beds could be better provided in alternative facilities such as intermediate care beds. The NHS National Plan's proposed expansion of intermediate care puts increasing emphasis on out-patient rehabilitation, which includes, for example, the earlier fitting of prostheses.

The Increasingly High Profile Consumer

U.K. interest groups for the elderly and disabled are very high profile and have played a large role in driving the U.K. government's initiatives to modernize its health care and social services programs. These interest groups include:

- The Royal Association for Disability and Rehabilitation (RADAR): The U.K. affiliate to Rehabilitation International, RADAR campaigns for equal rights for disabled people, promoting good practice and legislation that enables them to live independently in the community;
- EmPOWER: A charities consortium of users of disability equipment;
- The Disabled Living Foundation, which represents disabled people and others who use equipment or technology to enhance their independence;
- Age Concern England, a national charity that works to promote the well being of older people;
- Help the Aged, which provides practical support and advice to help older people live fulfilling and independent lives;
- Scope, one of the U.K.'s largest disability organizations, aiming to ensure disabled people will have access to properly resourced services which meet their needs;

- The Royal National Institute for the Blind; and
- The Royal National Institute for Deaf People.

Contact details for these groups are listed in Section 5.D.

1.C. Equipment Provision in the U.K. Market

In the United Kingdom, the majority of home health care and rehabilitation equipment is provided to the user either free of charge or for a minimal fee through the publicly funded health care and social services programs. The U.K. National Health Service (NHS) and the Personal Social Services (PSS) program are responsible for funding the provision and servicing of most equipment. This statutory provision of equipment is mainly carried out by local social services departments (the "Local Authority") or the local NHS health authority/hospital trusts.

Examples of public sector equipment provision include:

- Prosthetics and their subsequent servicing are provided free of charge by the local NHS authority/hospital trust either at the hospital or at the local Disablement Services Center.
- Most orthotics are provided free of charge by a health care professional recommended by an NHS GP. (There is often a small charge for such items as wigs, fabric supports, and elastic hosiery.)
- Daily living equipment is provided by the social services occupational therapy department. Equipment such as bed pans, incontinence pads, and pressure relief mattresses are supplied by the social services' district nurse.
- Audiology equipment is provided by a hearing specialist from the NHS health authority/hospital trust.
- Mobility equipment (except wheelchairs) is provided by the local social services physiotherapy department.
- Wheelchair provision is carried out by, or through, the NHS wheelchair service of the health authority or hospital trust and is usually organized on a local basis. It is able to provide a wide range of wheelchairs and cushions
- Assistive technology equipment and servicing is available from the NHS authority/trust.

However, the March 2000 Audit Commission report *Fully Equipped* revealed many shortcomings in the public sector provision of equipment in the United Kingdom, including:

- Equipment provision rarely bears much relationship to demand;
- Equipment is not always of a reasonable quality;
- Equipment providers are small, fragmented, and not well placed to respond to the pressures of demand.

Thus, many users purchase equipment privately, either through choice, or because the statutory services are unable to provide the item required (as in the case of some high-tech equipment such as powered wheelchairs or assistive technology) or because the system of supply takes too long.

1.D. U.K. Home Health Care and Rehabilitation Service Providers

The major providers of home health care and rehabilitation equipment in the United Kingdom are:

Home care service providers;
Care homes;
Physio- and occupational therapists; and
Hospitals.

Home Care Service Providers

Home care service includes nursing care, rehabilitation services, and such day-to-day assistance as bathing, cooking, and shopping. In 1998, over 2.5 million contact hours of home help were provided to about 446,000 U.K. households, up 16 percent since 1994. The home care market is estimated at $750 million (£500 million).

Home care is provided by both the public sector (through local authorities) and private organizations. Home care service provision in the United Kingdom is becoming more privatized, with the share of contract hours provided by the private sector rising from 19 to 46 percent from 1994-98. This shift is due partly to Social Services Local Authorities focusing home care on the most dependent consumers. In addition, Local Authorities have begun charging for services and contracting private and voluntary organizations to provide support services – such as meals on wheels services and respite care – on their behalf.

Care Homes

The U.K. care home market comprises over 30,000 homes with over 600,000 places (see Table 3). About 91 percent of U.K. care homes are private homes, while 9 percent are public. The total cost to the Government of providing long-term care free under the NHS has been estimated at between $330 million and $900 million (£220 million and £600 million) per year.

Table 3: Number of U.K. Care Homes

	Number
Total Care Homes	**30,353**
Private Sector*	**27,625**
-- Residential homes	21,074
-- Nursing homes	4,317
-- Dual registered homes	2,234
Public Sector	**2,728**
-- Local Authority owned homes	2,555
-- NHS owned homes	173
Total Number of Places	**605,002**

*Includes voluntary sector
Source: Laing & Buisson

Residential care homes provide personal care assistance to individuals who are unable to live alone and need help with personal care (e.g., washing, dressing, and going to the toilet). They do not provide long-term, full-time nursing care. Nursing homes house people who require 24-hour nursing care and can no longer be cared for by their GP or district nurse or by residential care home staff.

According to U.K. private health care experts Laing & Buisson, there are 434 major private-sector providers of care homes for elderly and physically disabled persons in the United Kingdom (major provider defined as an operator of three or more homes or a publicly quoted company). The private care home market is dominated by large companies, the major U.K. operators include:

- Ashbourne Homes plc
- Care First Group plc (BUPA)
- Country House
- Court Cavendish Group plc
- Cresta Care plc
- Grampian Care
- Sanctuary Care
- Westminster Health Care

Contact information for these companies can be found on the website www.privatehealth.co.uk/provider.htm.

<u>Physio- and Occupational Therapists</u>
According to The Chartered Society of Physiotherapy, physiotherapy is the fourth largest health care profession in the United Kingdom. There are 35,000 chartered physiotherapists in the United Kingdom, of which

- 38 percent work in NHS hospitals;
- 22 percent work in the NHS community services;
- 11 percent work in independent practice; and
- 29 per cent in other areas, including such major U.K. companies as Marks and Spencer.

There are also some 20,000 registered occupational therapists in the United Kingdom, the majority of which work for the NHS and Social Services.

<u>Hospitals</u>
There are 2,316 hospitals in the United Kingdom. Of these, 2,105 are NHS hospitals and 211 are private hospitals. Major private hospital operators include HCA – The Healthcare Company (the Tenessee-based U.S. health care giant who owns seven London-area hospitals), Priory Healthcare, BMI Healthcare, and BUPA. Information on these and other private hospitals can be found on the website www.privatehealth.co.uk.

1.E. Technology Developments
Over the last four decades, major advances have been made in the design and construction of aids and appliances for elderly and disabled people. These include:

New materials such as carbon fiber and titanium, which are lighter and stronger than conventional materials (i.e., steel), thus facilitating mobility for the user;

Advanced battery technology that increases the range for power-assisted wheelchairs; and

The emergence of such electronic-based sciences as robotics and cybernetics that have opened up an entirely new spectrum of assistive technologies (for example, environmental controls to help people control their home environment through a single switch).

1.F. Best Prospects

With demand for home health care and rehabilitation equipment expected to increase through 2005, the U.K. market for this equipment looks promising for U.S. manufacturers. The best prospects for this sector include:

High-tech equipment, such as powered wheelchairs and digital hearing aids;

Equipment made of state-of-the-art materials, especially in the prosthetics and orthotics sectors;

Sectors in which U.K. provision lags demand, such as hearing aids; and

Equipment most affected by U.K. government initiatives to promote independence in the elderly and disabled communities, such as daily living aids.

2. COMPETITIVE ANALYSIS

The U.K. home health care and rehabilitation sector is well established, yet fragmented, comprising some 300 companies that employ an estimated 10,000. The U.S. has a major presence in the market: Most large U.S. medical equipment manufacturers have operations in the United Kingdom, and the United States is consistently the No. 1 import supplier, supplying 37 percent of the import market.

A comprehensive list of home health care and rehabilitation manufacturers can be found on the British Healthcare Trades Association (BHTA) website at www.bhta.org.

2.A. Major Players in the U.K. Market

Major Domestic Companies in the U.K. Market

Arjo Ltd., a $67 million leading supplier of patient handling equipment.

Ashdale Healthcare, a U.K. manufacturer of rehabilitation products, including wheelchairs and seating equipment.

Chiltern Invadex Ltd., a $15.3 million U.K. manufacturer of lifting and handling equipment and assisted bathing products.

Huntleigh Technology plc, a $160 million U.K. manufacturer of pressure area care products; beds for hospital and community use; stretchers, ambulance trolleys, and carry chairs; and patient positioning systems.

Nottingham Rehab Supplies, the largest supplier of rehabilitation equipment to the U.K. primary care sector.

Pride Mobility Products Ltd., a $9 million U.K. manufacturer of lift chairs and scooters.

Smith and Nephew, a $3.6 million U.K. manufacturer, focusing on the medical areas of orthopaedics, endoscopy, and wound management.

SMS Technologies Ltd., a $8.1 million U.K. manufacturer of rehabilitation products and fixtures for rehab products, such as physiotherapy equipment.
Vernon-Carus, a $56 million U.K. manufacturer and distributor of health care products and surgical dressings.
Vessa Ltd., a $4.8 million U.K. manufacturer of artificial limbs that also provides prosthetic and orthotic services.

Major U.S. Brands in the U.K. Market

Bard Limited, a $325 million U.S. manufacturer of medical products for urology, gastro-oncology, biopsy, and surgical and woundcare.
Baxter Healthcare Ltd., a $318.9 million healthcare product manufacturer of disposal medical supplies. Products include dialysis equipment, cardiovascular machines, and artificial organs.
Invacare (U.K.) Ltd., the $24 million division of Invacare Corporation, the world's largest manufacturer of mobility aids and rehabilitation equipment.
Sunrise Medical, a major U.S. manufacturer of mobility products ranging from walking aids to powered and/or manual wheelchairs, as well as a wide range of rehabilitation supplies.
Tyco Healthcare UK Ltd., a subsidiary of Tyco International Ltd., a provider of accident and emergency equipment, disposable airway products, anti-decubitus mattresses and bandages.

Major Third Country Brands in the U.K. Market

Otto Bock (UK) Ltd., the German industry leader specializing in the manufacture and distribution of prosthetic and orthotic components, tools, and fabrication materials.

2.B. The U.K. Import Market

In 1999, the United Kingdom imported $1.7 billion worth of rehabilitation and home health care equipment (see Table 4). The United States is consistently the No. 1 import supplier, supplying 37 percent of the import market, followed by the Netherlands, Germany, and France. Taiwan is the U.K.'s largest import supplier of wheelchairs and parts.

Table 4: U.K. Imports of Rehabilitation and Home Health Care Equipment, 1999

Commodity	**World ($m)**	**U.S. ($m)**	**Germany ($m)**	**Holland ($m)**	**France ($m)**	**Taiwan ($m)**
Total	**1,697.4**	**633.0**	**193.6**	**217.2**	**89.8**	**26.4**
Wheelchairs	45.9	11.7	1.5	3.9	2.0	18.0
Wheelchair Parts	12.4	4.4	0.6	0.6	1.3	3.0
Medical Equipment	1217.3	438.5	175.1	153.0	69.0	4.2
Orthotics/ Prostheses	421.8	178.4	16.4	59.7	17.5	1.2

Source: HM Customs and Excise

3. END-USERS AND DISTRIBUTION CHANNELS

3.A. End Users

Over 4 million people – almost one third of the total U.K. population – use home health care and rehabilitation equipment, including:

400,000 users of orthopaedic footwear or callipers (orthotics);
65,000 amputees who use artificial limbs;
Between 640,000 and 750,000 users of wheelchairs and seating equipment;
Nearly 1 million people who need equipment to help them live independently; and
About 2 million people who use hearing aids.

3.B. Distribution Channels

There are five main distribution channels from which consumers and the major providers of home health care and rehabilitation equipment listed in Section 1.C. can purchase equipment; namely:

Manufacturers and distributors;
Retail outlets;
Mail order catalogues;
NHS Purchasing and Supplies Agency; and
Internet sales.

Contact information for these distribution channels can be obtained from Disabled Living Foundation through its network of 30 Disabled Living Centers (DLCs) throughout the United Kingdom. DLCs offer free and independent advice about equipment and procurement. Details on the Disabled Living Foundation are in Section 5.D.

<u>Manufacturers and Distributors</u>

U.K. consumers and health care providers can purchase their equipment directly from the manufacturer or from their distributor. Lists of these manufacturers and distributors can be obtained from the British Healthcare Trades Association, contact details for which are in Section 5.B.

<u>Retail Outlets</u>

Most of the major manufacturers and distributors operate showrooms throughout the United Kingdom. In addition, larger branches of major retail pharmacies and drug stores -- such as Boots the Chemist, Lloyds Pharmacies, Moss Chemists, and Superdrug -- often stock basic daily living aids for eating, bathing, and drinking.

<u>Mail Order</u>

Mail order is a popular distribution channel for home health care and rehabilitation equipment in the United Kingdom. Many major manufacturers -- such as Ashdale Healthcare, Robinson Healthcare, Smith & Nephew Rehabilitation, and Sunrise Medical -- have mail order catalogues. Other major mail order catalogues include Ways and Means;

Care and Mobility Ltd.; All for One; Aids to Daily Living; and Keep Able. These catalogues tend to specialize in daily living equipment.

NHS Purchasing and Supply Agency
Almost one-third of the $10.5 billion in goods and services used by the NHS is purchased by this agency, which then sells them to NHS organizations. Contact information for the agency is listed in Section 5.C.

Internet Sales
Internet sales of home health care and rehabilitation equipment are small; however, this method of distribution promises to become increasingly popular as more U.K. consumers and providers discover the benefits of Internet shopping. A number of companies offer home health care and rehabilitation equipment on-line, including most of the mail order companies.

4. MARKET ACCESS

4.A. Import Duties and Value-Added Tax
Rehabilitation and home health care equipment is classified into the following four categories in the Harmonized Trade Schedule (HTS):

- HTS 8713: Invalid carriages, whether or not motorized or otherwise mechanically propelled;
- HTS 8714.20: Parts and accessories for invalid carriages;
- HTS 9018: Instruments and appliances used in medical, surgical, dental, or veterinary sciences; and
- HTS 9021: Orthopaedic appliances, including crutches, surgical belts and trusses; splints and other fracture appliances; artificial parts of the body; hearing aids and other appliances which are worn or carried or implanted in the body to compensate for a defect or disability.

Import Duties
Rehabilitation and home health care equipment classified under HTS 8713, 8714, 9018, and 9021 can be imported into the United Kingdom duty free.

Value-Added Tax
A 17.5 percent value-added tax (VAT) is levied on the c.i.f. value of the products (the value of the product, plus carriage, insurance, and freight).

4.B. Procurement Practices
The U.K. market for home care and rehabilitation equipment is open and transparent in both the public and private sector. The NHS abides by EU and World Trade Organization (WTO) procurement legislation and operates according to its own set of internal business practices, including:

- Striving to achieve the best value for money;

- Encouraging competition amongst suppliers to secure better quality and lower priced products;
- Not restricting any supplier for competing for business; and
- Working with supplier and trade associations to achieve operating efficiency.

The NHS Purchasing and Supply Agency publishes tenders for its contracts on the website of the Official Journal of the European Communities, which contains information on public contracts for works, supplies, and services from all EU countries. The Tenders Electronic Daily (TED) site can be accessed at www.ted.eur-op.eu.int.

Procurement practices within the private sector vary according to the type of ownership of the independent organization. As only about 30 percent of independent care homes are owned by corporations, the decision of medical device procurement is solely the decision of the upper management and/or corporate head office level.

4.C. Market Regulations

The U.K. market for home care and rehabilitation equipment is subject to various regulations, the major regulations including:

- The EU Medical Devices Directives;
- Technology assessments by the National Institute for Clinical Effectiveness (NICE); and
- British and EU standards.

<u>CE Marking and EU Medical Device Directives</u>

All rehabilitation and home health care equipment sold in the United Kingdom and the EU must bear a CE mark. To qualify for a CE mark, products must comply with one of the below EU Directives, which regulate the safety and marketing of products throughout the European Union. These directives include:

- *The EU Medical Devices Directive*: Implemented in the United Kingdom by the U.K. Medical Devices Regulations 1994, this Directive covers a wide range of medical devices from such simple consumer products as bandages to such highly sophisticated equipment as CT scanners.
- *The EU Active Implantable Medical Devices Directive*: Implemented in the United Kingdom by the U.K. Active Implantable Medical Devices Regulations 1992, this Directive applies to such implantable devices as hip and knee prostheses.

The U.K. Medical Devices Agency (MDA) is responsible for the implementation and enforcement of these Directives in the United Kingdom. The requirements for CE marking vary from product to product depending on the associated risk: The greater the risk of the product to the user and/or the patient, the more extensive will be the level of evaluation and audit that may be required. For more information, contact the MDA at www.medical-devices.gov.uk.

<u>The National Institute for Clinical Excellence (NICE)</u>

Established in April 1999, NICE is the U.K. technology assessment program that judges the clinical- and cost-effectiveness of new and existing devices used by the NHS, and provides the NHS with guidance on treatment strategy. Although not legally binding, the NHS community is expected to follow these guidelines.

To date, NICE has only examined one rehabilitation device – hip prostheses – and has issued a positive ruling. However, the Audit Commission Report expressed concern that the quality of equipment currently on the U.K. market is not sufficient to meet the demands of this new clinical governance agenda. In addition, some in the industry believe that if future NICE assessments of new medical devices – which are typically more expensive than existing equipment – are not done properly, U.S. medical device manufacturers could be disproportionately affected, as they are the most innovative companies in the United Kingdom and Europe.

More information about NICE can be found on the website www.nice.org.uk.

British and EU Standards
Home care and rehabilitation equipment sold in the U.K. market must comply with British and EU standards. These standards are listed on the website http://bsonline.techindex.co.uk and include:

- BS 7251: Orthopaedic joint prostheses
- BS 7313: Prosthetics and orthotics
- BS 6935: Wheelchairs
- BS 5181:1975: Wooden walking sticks
- BS 5205:1990: Adjustable metal walking sticks
- BS EN ISO 11334-4:1999: Walking aids manipulated by one arm
- BS 6083: Hearing aids

5. CONTACTS

5.A. The U.S. Commercial Service in London

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U.S. Commercial Service
24 Grosvenor Square
London W1A 1AE
Tel: 44-20-7408-8017
Fax: 44-20-7408-8020
E-mail: MaryAnn.Slater@mail.doc.gov
www.usembassy.org.uk/fcs

5.B. U.K. Trade Associations

Association of British Health Care Industries (ABHI)
St. George’s House
195-203 Waterloo Road
London SE1 8WD
Tel: 44-20-7787-3060

Fax: 44-20-7787-3061
www.abhi.org.uk
ABHI is the U.K.'s leading trade association for the medical systems industry.

The British Healthcare Trades Association (BHTA)
1 Webbs Court
Buckhurst Avenue
Sevenoaks
Kent TN13 1LZ
Tel: 44-1732-458-868
Fax: 44-1732-459-225
www.bhta.com
BHTA is the leading U.K. trade association representing companies that provide products and services for people with special physical needs and other specialist healthcare areas.

Independent Healthcare Association (IHA)
22 Little Russell Street
London WC1A 2HT
Tel: 44-20-7833-9123
Fax: 44-20-7242-2681
www.iha.org.uk
The IHA is the leading association for the U.K. independent health and care providers.

The Chartered Society of Physiotherapy
14 Bedford Row
London WC1R 4ED
Tel: 44-20-7306-6666
Fax: 44-20-7306-6611
www.csp.org.uk

British Association of Occupational Therapists/College of Occupational Therapists
106-114 Borough High Street
London SE1 1LB
Tel: 44-20-7450-2337
Fax: 44-20-7450-2349
www.cot.co.uk

5.C. U.K. Government Health Organizations

NHS Executive
Health and Social Care Joint Unit
Room 214/215
Wellington House
133-155 Waterloo Road
London SE1 8UG
Fax: 44-20-7972-4487

www.doh.gov.uk/jointunit/index.htm

Department of Health
Social Care Group
Room 228
Wellington House
133-155 Waterloo Road
London SE1 8UG
Tel: 44-20-7972-4110
Fax: 44-20-7972-4132
www.doh.gov.uk/scg/social.htm

Medical Devices Agency (MDA)
Hannibal House
Elephant & Castle
London SE1 6TQ
Tel:44-20-7972-8000(main number)
   44-20-7972-8216(rehabilitation and transfer equipment)
   44-01253-596-000(mobility and seating equipment)
   44-20-7972-8283(implantable devices)
Fax:44-20-7972-8108
www.medical-devices.gov.uk

NHS Purchasing and Supply Agency
Premier House
60 Caversham Road
Reading RG1 7EB
Tel: 44-118-980-8619 (main switchboard)
     44-118-980-8852 (Purchasing Executive, Rehabilitation Division)
     44-118-980-8819 (Prosthetics, orthotics, electronic assistive technology)
     44-1244-586-721 (Vision aids, audiology, wheelchairs)
www.pasa.doh.gov.uk

5.D. U.K. Interest Groups
Age Concern England
Astral House
1268 London Road
London SW16 4ER
Tel: 44-20-8765-7200
Fax: 44-20-8765-7211
www.ace.org.uk

Disabled Living Foundation
380-384 Harrow Road
London W9 2HU
Tel: 44-20-7289-6111

Fax: 44-20-7266-2922
www.dfl.org.uk

emPOWER
c/o Limbless Association
Rehabilitation Centre
Roehampton Lane
London SW15 5PR
Tel: 44-20-8788-1777
Fax: 44-20-8788-3444
www.empowernet.org

Help the Aged
St. James's Walk
Clerkenwell Green
London EC1R 0BE
Tel: 44-20-7253-0253
Fax: 44-20-7251-0747
www.helptheaged.org.uk

Royal Association for Disability and Rehabilitation (RADAR)
12 City Forum
250 City Road
London EC1V 8AF
Tel: 44-20-7250-3222
Fax: 44-20-7250-0212
www.radar.org.uk

Royal National Institute for the Blind (RNIB)
224 Great Portland Street
London W1N 6AA
Tel: 44-20-7391-2251
Fax: 44-20-7388-8316
www.rnib.org.uk

Royal National Institute for Deaf People (RNID)
19-23 Featherstone Street
London EC1Y 8SL
Tel: 44-20-7296-8000
Fax: 44-20-7296-8001
www.rnid.org.uk

Scope
6 Market Road
London N7 9PW
Tel: 44-20-7619-7100

www.scope.org.uk

5.E. Further Information
Laing & Buisson
29 Angel Gate
City Road
London EC1V 2PT
Tel: 44-20-7833-9123
Fax: 44-20-7833-9129
www.laingbuisson.co.uk
Laing & Buisson provides information and market intelligence about the U.K. independent health and community care sectors.

Further resources on the U.K. disability and rehabiliation market can be found on the websitewww.nottingham.ac.uk/rehab/rehab/disreh.htm

6. U.K. TRADE SHOWS
Independent Living Shows
Exhibitions are held annually in London (September) and Birmingham (November).
Organizer: Independent Living Events
Website: www.independentlivingevents.co.uk

National Nursing & Care Homes Exhibition
February
London
Organizer: DMG Business Media Ltd.
Tel: 44-1737-768-611
Fax: 44-1737-855-479
Website: www.dmg.co.uk

Special Needs London
November
London
Organiser: The Publishers Association
Tel: 44-20-7565-7474

Rehab & Care
November
Birmingham
Organizer: Independent Living Events
Website: www.independentlivingevents.co.uk

Mobility Roadshow
June, biennial (1999, 2001)
Crowthone, Berkshire
Organizer: Mobility Choice

Tel: 44-1344-770-946
Website: www.mobility-unit.detr.gov.uk

7. U.K. TRADE PUBLICATIONS

<u>Hospital Equipment & Supplies</u>
Wilmington Publishing Ltd.
Wilmington House
Church Hill
Dartford
Kent DA2 7EF
Tel: 44-1322-394-754
Fax: 44-1322-270-554

<u>Care and Nursing Essentials Magazine</u>
97 Heaton Street
Standish
Wigan
Lancashire WN6 0DA
Tel: 44-1257-423-333
Fax: 44-1257-424-444

<u>Disability View Magazine</u> (monthly)
Park Lane House
47 Broad Street
Glasgow G40 2QW
Tel: 44-141-550-2950
Fax: 44-141-550-2947
Web site: www.disabilityview.co.uk

<u>Special Needs Magazine</u>
MCM Multimedia Ltd.
40 St Enoch Square
Glasgow G1 4DH
Tel: 44-141-248-6309
Fax: 44-141-248-6346

<u>The Homecare Industry Information Service</u> (monthly)
C/o Marketing Matters
2 Butlin Close
Rothwell
Northants NN14 6YA
Tel: 44-1536-710-050
Fax: 44-1536-418-280